

Selecting and Implementing a Donor Management System

CASE/AASP Webinar

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Where We're Going

- Selection dos and don'ts (30 minutes)
- Thriving in an implementation (30 minutes)
- Discussion/Therapy (15 minutes)



Image: [Marcelo Nava](#)

What Should You Expect?

Your donor database should help you:

- Track activities and assets (asks, gifts, events, etc.).
- Monitor and forecast performance.
- Focus your efforts and work strategically.
- Report to your board, donors, funders, public.
- Better connect with your constituents.
- Remember: Databases Don't Raise Money, People and Good Business Processes Do!

When to Change?

- Routine reports are painful to produce.
- Critical information is on paper.
- Can't track metrics or progress.
- Data scattered in spreadsheets.
- Data can't be integrated across systems.
 - Can't get 360 degree view of relationships.
- Data is in fundraisers' heads.
- Outgrew last system or organization is changing.
- Bad vendor or wrong choice last time.

Buying A Database

- 1) Convene the right team.
- 2) Specify your needs and priorities.
- 3) Identify a pool of potential vendors.
- 4) Test vendors against your needs.
 - Demos
 - Hand-on testing
 - Reference checks
 - Site visits
- 5) Cost proposals.

So why is this so F*#@!g Complicated?!



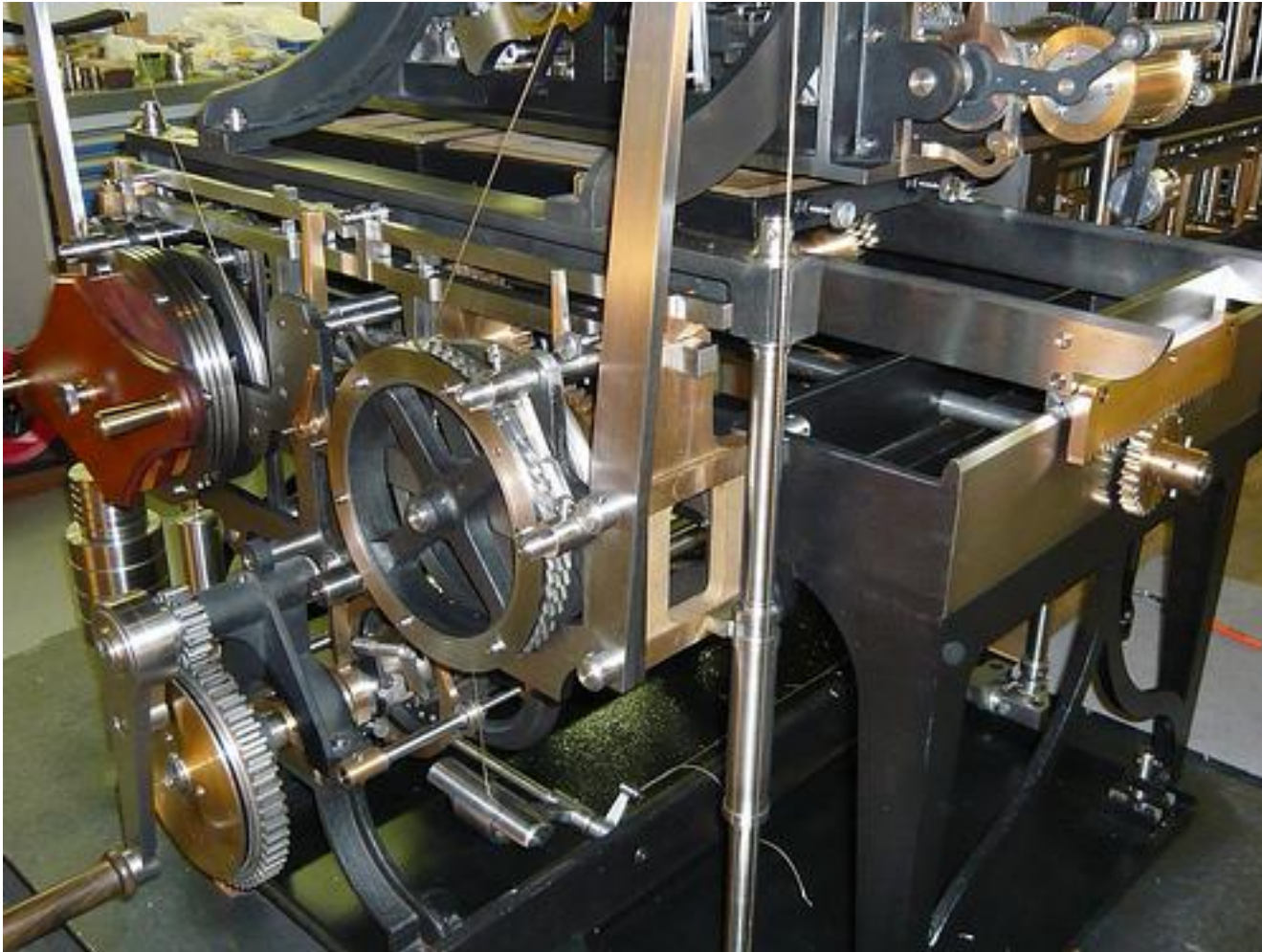
Image: [Marc Brakels](#)

It's Therapy



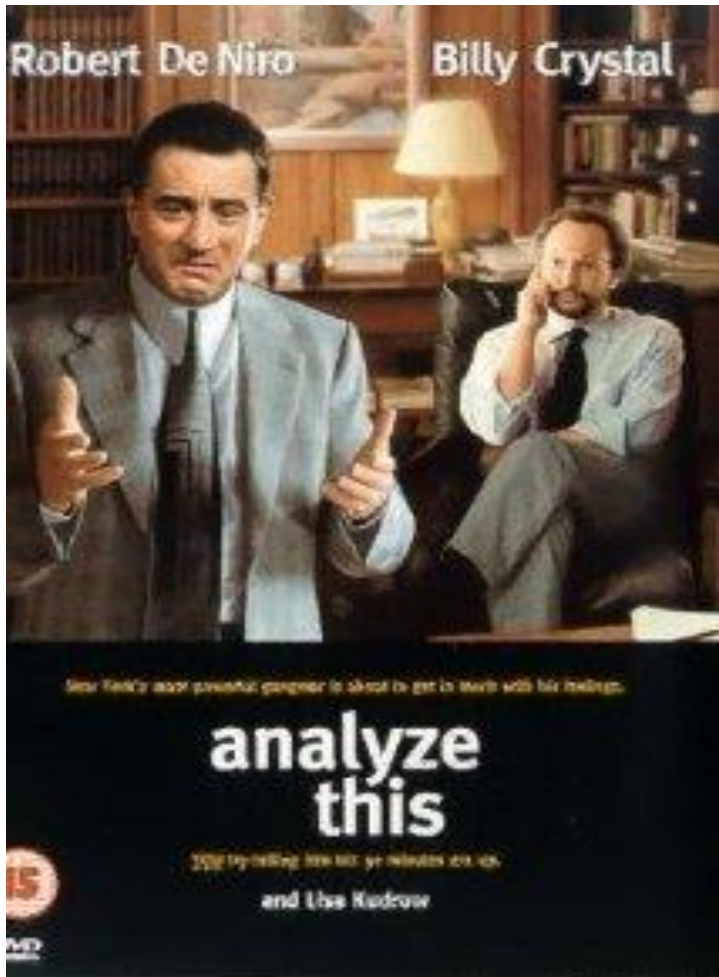
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There are lots of moving parts



Babbage Difference Engine - Image: [Marcin Wichary](#)

Know Yourself



Copyright: Village Roadshow Pictures

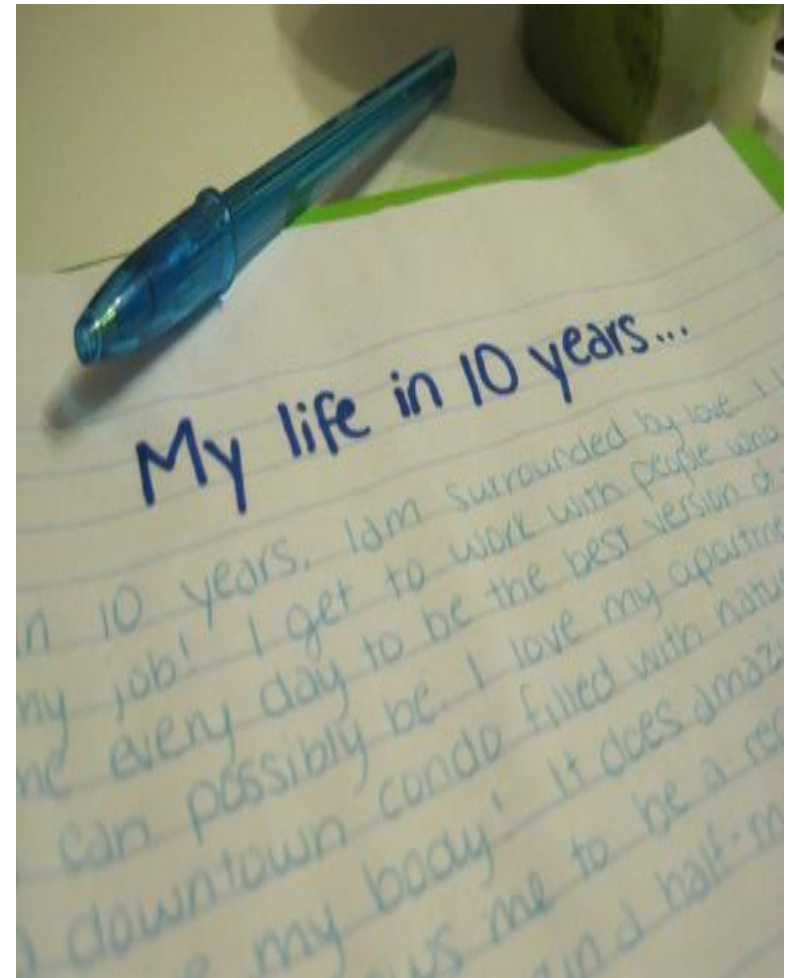


Image: [lululemon athletica](https://www.lululemonathletica.com/)

Assemble Your Team



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Document Your Requirements



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Prioritize Your Needs

Feature	Must have	Would be nice	Ideal	Not Req'd	Comments
Records Administration					
Multi-level password protection					
Join and separate records for couples					
System has a "smart search" feature so user does not have to type in records full name.					
Users can set up data-entry defaults.					
Separate recognition names (annual reports or honor rolls) so donors can be tracked.					
System allows for joint and separate giving records for spouses.					
Addressee/mailling name and salutations are auto-created based on a prefix and last name (i.e., Mr. Tom Jones).					
User can overwrite auto-created addressee or mailing names.					
Relationships can be tracked between records (employer/employee, board member/organization).					

Source: <http://www.fundraising123.org/files/donor+management+toolkit+book.pdf>

What's Your Budget?

Item	Unit	Cost	Total
Software	1	\$50,000.00	\$50,000.00
Implementation Consulting		\$25,000.00	\$25,000.00
Staff training (per day)	5	\$1,500.00	\$7,500.00
Workstations	20	\$1,250.00	\$25,000.00
		Total Year 1	\$107,500.00
Software & Support, years 2 - 5	4	\$10,000.00	\$40,000.00
Ongoing Training	4	\$1,500.00	\$6,000.00
		Total Year 5	\$153,500.00

Think about inputs, outputs, and integration



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Know Your Limitations



Image: [inju](#)

Narrow Your Choices



Image: [emilio labrador](#)

Compare Apples to Apples



Vs.



Image: [Castaway in Scotland](#)

Image: [Brooks Elliott](#)

Tell Vendors What You Need To See

- Sample of a Demo Script:
 - Add a record for Barney Rubble, with a \$25 gift.



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Demo Script

- Add a record for Elizabeth McBricker, with a \$10,000 multi-year pledge through her family foundation. Give Elizabeth soft credit.



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Demo Script

- Marry the two records, change Elizabeth's last name to Rubble, add a salutation for "Betty", and show joint giving.



Image: Wedding Collectibles

Demo Script

- They divorce. Show the database process. Are both of them still major donors?



Image: [DrJohnBullas](#)

Grade the Demos



AREA	RATING	COMMENTS
Data Entry		
Membership Management		
Prospect Management		
Events Management		

Hands-on Testing



Resource: System Usability Scale

www.usabilitynet.org/trump/documents/Suschapt.doc

Image: [colemama](#)

Principles

- There is no perfect database.
- First, decide what you're looking for.
- Buy-in is critical. Stakeholders must be involved in the decision.
- Structure software demos so you can compare “apples to apples.”
- Make sure you understand all the costs.
- Trust but verify.

Any Questions So Far?



Dare to be dull! Managing your project

- Let's talk about how to manage the project using some concrete methods and disciplines
- Oh, The Humanity! Yes, artifacts of project management.
- **Project Scope**—signed by as high a person in hierarchy as possible
- **Project Plan**
- **Project Budget**

Dare to be dull! Managing your project

- **Stakeholder** meetings
- **Risk Register** with mitigation plans
- **Easy graphics** that show progress
 - Time
 - Spend plan
 - Milestones (from scope and plan)
 - Project Budget overall
 - Accomplishments
 - RISKS

Project Staff

- Some large assumptions....
- You have or you have hired the best team possible with the most accurate job descriptions
- How true is that?
- And how can you make it true
- Jon Croteau, “People First Approach,” published by CASE

Personnel is often 70-80% of any project's costs

- You will probably have to write or re-write job descriptions or performance plans
- Develop a good road map for each person and their role(s)
- Fight, fight, fight for resources...
- Or, better phrased. Make repeated cases for support to your boss, her boss, your CFO, your CIO, and your Human Resources Office.
- Rinse and repeat hourly.

Tips on essential employees for project

- Project manager needs to be 75% to 100% full time—Healthcare.gov anyone?
- A fight for resources is one worth having
- Allocating resources across the plan is one of the best activities a project manager can perform
- **Political leader who helps manage expectations, communicates in a variety of ways, and is a public cheerleader**

Good job descriptions and performance plans

- One of the best places to get ideas is...<http://supportingadvancement.com/>
- Often as part of belonging to a user group, other people share up-to-date skills and competencies
- If you have new software, how can you hire, train, import or buy that knowledge?
- Scan the environment—smart users, vendor, staff who show an interest and skill even if not in job, your network

Depending on scope and timing of project....additional roles, if not FTE

- Reporting/data warehouse lead
- Specification writers
- Developers who can pass some *basic tests* that you provide (Crystal, SQL, Cognos) and then perhaps a training plan for them to get up to speed
- Testing lead (someone who can manage the testing process and test him or herself)
- Communications.

Depending on scope and timing of project....additional roles, if not FTE

- One of the most under-rated and most essential positions is an excellent business analyst
 - who learns your business
 - and software
 - and can lead groups
 - and walks on water....see Misty McCarty of UNH for her clone or ideas.
- Can determine gaps, write specifications, answer user needs without spending decades

.

Project Management

- *“In preparing for battle, I have always found that plans are useless, but planning is indispensable.”* – General Dwight D. Eisenhower
- So spoke the man who planned and managed Project Overlord, D-Day.
- This essential activity can be learned and you can scale it to your project! Do not be afraid.
- Project statement with signatures

Project Management

- Develop high level plan. Can you learn the dreaded MS Project via books, tapes, YouTube and practice?
- **The What**—Some high level activities before you deep dive:
 - Planning (make time for it on plan)
 - Developing technical environments
 - Determining new business rules or processes

Project Management

- Determining new business rules or processes
- Business process re-design (oy! Over used jargon that is essential)
- Mapping
- Converting data
- Reporting needs (start the list of current reports, needs answered, source of data)

Planning

- Developing reporting and/or flattened tables
- Specifying customizations and reports
- Writing code
- Testing code
- End-end migration movement from various environments
- “Go-live” activities
- Stabilization and Help Desk activities

Something to consider as you plan and start

- How do you best, strategically involve your users?
- As importantly, how do you persuade users?
- When we have Q&A, it would be great to hear how participants have involved and persuaded users!

Reporting!

- The part that makes or breaks an implementation
- No pressure, though
- Use your assessment of current reports
- And...what have your users been asking for since The Ark?
- Resources to tap into....Your user group, your leaders' favorite reports from other organizations, consultants

Reporting!

- List each subsystem and its reporting needs—due to your wonderful business analyses!
- As you go through the conversion, maximize reporting tables and determine what’s “grabbable”
- Develop report mock-ups before investing
- Go through the list of needs and make a labor plan so you know what is do-able, based on your resources and timing

The Discipline of Rolling Out Reporting

- Make time for each step along the way
- Spec writing
- Spec reviewing
- Spec sign-off
- Coding
- Code review (may or may not be possible)
- Test plan with specification matching it

The Discipline of Rolling Out Reporting

- Testing and sign-off
- Migrate to Development or Test environment to ensure it breaks nothing
- Write reporting documentation for users
- Now, The Who
- Who are the staff members or consultants who can do these activities
- Give them a specified amount of time for each activity

How do you get your leadership and users to prioritize

- Ensure there is no overlap or over-allocated resources
- Voila! So easy.
- Ha.
- As the draft plan is being built...
- Ask users to rate priorities via a variety of methods
- What is needed for auditing and two year ends (FY and calendar)

How do you get your leadership and users to prioritize

- Campaign needs? Are there known ones?
- Ensure you know how many staff hours your small, medium and large efforts are
- What we learned at SI:
 - Small effort was 100 hours
 - Medium effort was 100-150 hours
 - Large effort was 150-175 hours

One method to keep track of reporting needs and stages—inspired by Erica Schuppert

C	D	E	H	I	J	K	M
Code	Report/Enhancement	Description	Scope	Timeframe	Est PROD Qtr	Status	Category/ Primary Audience
GR13	GR13 - Pledge Listing	Monthly OC report of active pledges	Medium	FY 14	Q3	Scope Change - on Hold	Gift
MS32	MS32 - Renewals Utility		Large	FY 14	Q3	Testing Pass 3+	Membership Operations
MS33	MS33 - Appeals Utility		Large	FY 14	Q3	Testing Pass 3+	Membership Operations
EN035	EN035 - Batch # prompt form (if limit what is on the output -- could be quick)	It would be very helpful to IAC (and probably lots of other people, too), if the Gift Batch # could be included on a gift transaction lookup. This functionality exists in Membership, and would be very helpful in Gift, as well. (It's apparently coming in 9.9, just fyi) HEAT #885994	Medium	FY 14	Q3	Spec in Process	Gift
EN031	EN031 - Gift Listing: 1) Add Prompt for Processed Date and add processed date to the export (889143) 2) Change logic for last transaction to look at either dues or gift (when 'include memberships' is selected) (889143) 3) Add payment type short description to view and export (887665) 4) Add zip code to export (888569) 5) Add DCR fields to prompt and output 6) Add Purpose Category to prompt and output	To remediate this, we were thinking it would be great to add a prompt for the "Processed Date" or "Date Added" range to this report. Then he could use that for his daily runs, and would work well for the end of the fiscal year/calendar year when gifts are often back-dated. Possible? Let me know if you need more info. Thanks! Beth	Large	FY 14	Q3	Sign-off	All

How do you get your leadership and users to prioritize

- Ranking by key leadership
- Ranking by key functional leads
- Asking your reporting team—they are close to the requests
- Publish plan
- Develop plan for when the reports will be rolled out—perhaps by quarters
- Let your users know and keep the party line for your team

Ensuring a way to embrace reports

- Good training and documentation on running reports
- Keep track of new requests and let users know they will be assessed every six months for next roll-out
- Keeping ad-hoc requests to a manageable work load—and use industry standards of 10 working days

Publish your reports along the way

- Publish your successes! You will take hits along the way, so be your team's advocate
- Some screen shots and easy to use procedures
- Put into a newsletter, e-flash or webinar
- Have brown-bag lunches to show the group's whom are most effected....
- Ask for some evangelists—users, leaders, a nice e-mail, a quote from a user.

Resources

[Association of Advancement Services Professionals](#)

[FUNDSVCS](#) listserve and downloads site (lots of samples)

[Idealware](#)

[NTEN lists & Communities of Practice](#)

[SupportingAdvancement.com](#) (lots of samples)

[TechSoup's Databases and Software forum](#)

Database user groups

Database conferences with nonprofit tracks

Resources

Melissa Barber: [*An Accidental Techie #FAIL Story \(CRM project gone wrong\)*](#)

Laura Bibbo: [*7 Things to Think About Before You Implement a Fundraising System*](#)

Cloud4Good: [*Choosing the Right CRM Administrator*](#)

Keith Heller: [*Do You Need New Donor Management Software?*](#)

Keith Heller: [*What is CRM and what does it mean to nonprofits?*](#)

Idealware: [*10 Things To Consider in a CRM*](#)

Idealware: [*Consumers Guide to Donor Management Systems*](#)

Tracy Kronzak: [*So You've Hired a CRM Administrator...*](#)

Tracy Kronzak: [*Why CRM Implementations Fail and How to Avoid It*](#)

Resources

Tracy Kronzak: [*Salesforce Administrators and Puppies*](#)

Bethany Lang: [*Moving in to your new nonprofit CRM*](#)

Michelle Murrain: [*The True Costs of Free and Low-Cost Software*](#)

NTEN Workbook: [*Getting Started with Data-Driven Decision Making*](#)

Mary Pustejovsky: [*Top Qualities in a Great CRM Administrator*](#)

Laura Quinn: [*There Ain't No Such Thing As a Free Software Package*](#)

Laura Quinn: [*Is A Single Database Right for Your Org?*](#)

Holly Ross: [*Selecting a Nonprofit CRM System? Start with the Strategy!*](#)

Salesforce: [*Achieving outstanding CRM administration*](#)

Wild Apricot: [*Membership Database Selection*](#) (part 1 of 3)

Resources

Robert Weiner: *Finding the Perfect Fundraising Database in an Imperfect World*

Robert Weiner: *Back Away From That Spreadsheet: Why Excel Isn't a Donor Database*

Robert Weiner: *Ten Common Mistakes in Selecting Donor Databases (And How to Avoid Them)*

More resources are posted at

www.rlweiner.com/resources.html

and www.cloud4good.com/blog/

Resources for Building a Great Team and Reporting Build-out

Jon Croteau, [“People First Approach,” CASE publications](#)

Hiring good business analysts: <http://hiring.monster.com/hr/hr-best-practices/recruiting-hiring-advice/job-descriptions/business-system-analyst-job-description-sample.aspx>

Daniel Pink, author of “DRIVE.”
<http://www.youtube.com/watch?v=u6XAPnuFjJc>

Good article on how to involve users in reporting build-out.
<http://smartdatacollective.com/ian-nicholson/76961/ten-reasons-why-your-users-won-t-use-your-business-intelligence-solution>

Q&A



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More Questions?

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